CPA
Practice **Advisor**

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Cathy Rowe, CA — 36

What are the key areas of your firm that have seen the greatest change in workflow over the past few years? Are you using automated workflow tools? Although the underlying workflow requirements have not changed significantly, ever-increasing pressures on profitability within the competitive landscape and additional regulatory demands have forced practitioners to produce more work in less time. However, these pressures are largely invisible to clients, who still receive the same financial statements and opinion letters. In this challenging context, automated workflow solutions are critical to profitability. The software design team at CCH brings the customer workflow perspective into the software development process in innovative ways. We strive for ease of use within individual software products and streamlined integration among products within the CCH Axcess and ProSystem *fx* product lines, ensuring our customers receive the automatic workflow support they need.

Have you embraced cloud computing for your practice? Are you moving your clients to the cloud? The software design team at CCH relies heavily on the cloud for internal communication and collaboration, anytime and anywhere, with colleagues and customers. Additionally, the cloud enables innovations such as virtual hands-on labs, through which we obtain immediate feedback from our customers during the design process. For accounting firms, moving to the cloud provides all of those same advantages while reducing infrastructure costs and providing opportunities for innovative new client services to supplement traditional revenue sources. For instance, this year I have made on-site visits to several firms that offer "Virtual CFO" services, accessing client data in real time to provide consulting services such as review of purchase/sale agreements or guidance on accounting transactions. CCH is highly committed to supporting our customers in that transition through cutting-edge cloud software such CCH Axcess and ProSystem *fx* Mobile.

On a broader scale, how do you see new technologies changing the accounting

impacted your productivity and work-life balance? Mobile devices have definitely improved my work life balance. I manage a team across several different time zones and I am able to quickly access my email, desktop sharing and any of my files so I can support my team and respond to critical issues without have to be in my physical office. Working in a CPA firm is no different, one customer told me that he was sitting at a baseball game and because of the mobile technology available he was able to access all the necessary client data to answer questions – he was able to continue to enjoy the game and at the same time provide value to his client.

Have you found business success via social media, either via recognizable ROI, new customers, marketing or networking? CCH has several communities on LinkedIn and these have been an invaluable tool to the design team to learn more about our customers. We are able to listen directly to a group of customers discussing problems which helps give us a new perspective for understanding the problem, which in turn impacts how we prioritize and determine a solution.

What tips on social media do you think are essential, but perhaps missed, by professionals and small businesses? There is so much data shared on Facebook, Twitter and LinkedIn, making it easy to have important information overlooked. Posts should be limited to those that are impactful to users and will help them in their everyday work.

What single piece of technology do you find the most important in your professional life? Desktop sharing software is essential for collaboration both internally and externally. The design team uses desktop sharing with the entire development team to share requirements and troubleshoot problems – this is important as we all work remotely. Desktop sharing is also critical for easy collaboration with our customers. When we release our products we want to be sure we are solving the problems in the best way. To do this, we share prototypes or even

give control of our desktops so that customers can 'touch and feel' the product

What brand/model mobile phone do you use? iPhone.

Do you use a tablet for work purposes? I have used my iPad for the past few years for simple tasks such as email and note taking while I am travelling. I just received a Windows 8 tablet and I am excited that the CCH applications such as ProSystem *fx* Engagement will work on it and therefore can be used in place of a laptop.

What is your favorite accounting mobile app, and why? ProSystem *fx* Mobile app is a great extension of CCH Axcess, allowing CPA firms to have more flexibility and deliver services to their clients from anywhere. The app provides access to client information and has the ability to publish them to clients' portals from the device, all with the ability to capture time!

How many monitors do you have on your desktop workstation? I have used two monitors for several years. I often use my iPad or iPhone to quickly reference notes and email so that my monitors are used for "real work" and my productivity is less impacted by constant emails. This past year when I visited several CPA firms the trend seems to be growing to at least three monitors.

Read more about this year's 40 Under 40 Honorees.

Technology

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